

Age: 58		PUBLIC GUARDIAN , Conservator, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Account period: 12/13/12 – 12/19/14	
		Accounting - \$79,686.12	
		Beginning POH - \$4,932.77	
Cont. from		Ending POH - \$9,444.12	
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified	Conservator - \$3,273.44 (11 staff hours @ \$76/hr. and 25.39 deputy hours @ \$96/hr.)	
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.	Attorney - \$1,250.00 (less than allowed per local rule)	
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail	Bond fee - \$232.96 (ok)	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.	Costs - \$435.00 (filing fees)	
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen	Petitioner states that the conservatee is now subject to an LPS conservatorship as of 12/17/14 and therefore her funds can be managed by the Public Guardian under their payee system and this conservatorship is no longer necessary.	
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report	Petitioner prays for an Order:	
<input type="checkbox"/>	2620	1. Finding that the conservatorship is no longer necessary, and ordering its termination;	
<input checked="" type="checkbox"/>	Order	2. Approving, allowing and settling the second and final account;	
<input type="checkbox"/>	Aff. Posting	3. Authorizing the conservator and attorney's fees and commissions;	
<input type="checkbox"/>	Status Rpt	4. Authorizing the bond fee and costs; and	
<input type="checkbox"/>	UCCJEA	5. Authorizing petitioner to distribute the remaining estate of \$4,252.72 to the Fresno County Public Guardian as payee of the LPS conservatee.	
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		

Reviewed by: JF
Reviewed on: 02/10/15
Updates:
Recommendation:
File 1 - McBride

2A Wanda H. Bingham (CONS/PE)

Case No. 11CEPR00949

- Atty Krause, Stephanie J. (for Randy Grace – Petitioner and Co-Trustee of Trust)
- Atty Magness, Marcus D. (also for Randy Grace – Petitioner and Co-Trustee of Trust)
- Atty Roberts, David A. (for Joan St. Louis – Former Conservator)
- Atty Boyett, Deborah K. (Court appointed attorney for Conservatee Wanda H. Bingham)
- Atty Burnside, Leigh W. (for Wells Fargo Bank, N.A. – Co-Trustee of Trust)

Petition for Appointment of Successor Probate Conservator of the Person and Estate (Prob. C. 1820, 1821, 2680-2682)

	See petition for details.	
		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Court Investigator advised rights on 10-31-14 and 11-5-14</u></p> <p><u>Voting right affected – Need minute order.</u></p> <p><u>Note:</u> Page B is the corresponding Petition for Removal of current conservator; however, the Order Granting Conservator Leave to Resign as Conservator of the Person and Estate was entered 12-4-14 and the Court accepted Ms. St. Louis' resignation as of Midnight on 12-31-14. See also Ms. St. Louis' Resignation filed 1-6-15.</p> <p><u>Note:</u> A Petition for Order to Pay Attorney Fees was filed 1-15-15 by Temp. Conservator Randy Grace that is set for hearing on 2-19-15.</p> <p><u>SEE ADDITIONAL PAGES</u></p>
Cont 111914, 121514		
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail	w	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input checked="" type="checkbox"/> Conf. Screen		
<input checked="" type="checkbox"/> Letters		
<input checked="" type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt	x	
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: skc
		Reviewed on: 2-10-15
		Updates:
		Recommendation:
		File 1A - Bingham

NEEDS/PROBLEMS/COMMENTS: The following issues remain noted:

1. Notice was served on Deborah Boyett as Court appointed attorney for Conservatee Wanda Bingham. The Court may require direct notice to the Conservatee pursuant to Probate Code §§ 1460(b) and 1214 and Cal. Rules of Court 7.51(c).
2. Petitioner has filed bond of \$485,578.45; however, based on the estimated value of the estate, Examiner calculates that bond should be at least \$550,236.52, which includes cost of recovery pursuant to Probate Code §2320(c)(4) and Cal. Rule of Court 7.207.

Note: The estimated value of the estate appear to be based on the accounting filed by the current conservator, which has been denied. The Court has ordered that an amended account be filed by 3-16-15.

3. The Petition at #1k requests orders related to dementia medication and placement; however, the separate Attachment Requesting Special Orders Regarding Dementia (Mandatory Judicial Council Form GC-313) was not attached to the petition or served on interested parties, and the proposed order does not specify dementia medication and placement powers.

Examiner notes that the additional medical consent and dementia medication and placement powers requested herein were originally granted to the original conservator, David St. Louis; however, additional orders were made pursuant to agreement reached at Court Trial on 12-6-11 and Order After Hearing Regarding Placement filed 12-13-11.

The 12-13-11 Order specifies that care providers for Byrum Bingham (now deceased) and Wanda Bingham are to be present inside the main residence 24 hours per day; that Wanda Bingham is to abide by the dietary and nutrition guidelines recommended by her treating physician, and that the keys to the automobile are to be kept in the possession of the care providers or the conservator, David St. Louis.

Examiner is not aware without extensive further review of the file whether subsequent agreements or orders were made regarding Mrs. Bingham's care and placement after Mr. Bingham's death, or after Mr. St. Louis' death. The Court may require clarification.

2B Wanda H. Bingham (CONS/PE)

Case No. 11CEPR00949

- Atty Krause, Stephanie J. (for Randy Grace – Petitioner and Co-Trustee of Trust)
- Atty Magness, Marcus D. (also for Randy Grace – Petitioner and Co-Trustee of Trust)
- Atty Roberts, David A. (for Joan St. Louis – Conservator)
- Atty Boyett, Deborah K. (Court appointed attorney for Conservatee Wanda H. Bingham)
- Atty Burnside, Leigh W. (for Wells Fargo Bank, N.A. – Co-Trustee of Trust)

Petition for Removal of Conservator of Person and Estate of Wanda H. Bingham,
and for Costs, Expenses and Attorney Fees

	See petition for details.	
Cont from 111914, 121414		<p>NEEDS/PROBLEMS/ COMMENTS:</p> <p><u>Note:</u> The Order Granting Conservator Leave to Resign as Conservator of the Person and Estate was entered 12-4-14 and the Court accepted Ms. St. Louis' resignation as of Midnight on 12-31-14. See also Ms. St. Louis' Resignation filed 1-6-15.</p> <p>4. Notice was served on Deborah Boyett as Court appointed attorney for Conservatee Wanda Bingham, and on David Roberts as attorney for the current Conservator Joan St. Louis. The Court may require direct notice to the Conservatee and the current Conservator pursuant to Probate Code §§1460(b) and 1214 and Cal. Rules of Court 7.51(c).</p>
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail	w	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input checked="" type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: skc
		Reviewed on: 2-10-15
		Updates:
		Recommendation:
		File 1B - Bingham

		See petition for details.	NEEDS/PROBLEMS/COMMENTS: 5. Notice was served on Deborah Boyett as Court appointed attorney for Conservatee Wanda Bingham. The Court may require direct notice to the Conservatee pursuant to Probate Code §§1460(b) and 1214 and Cal. Rules of Court 7.51(c).	
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			W
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 2-10-15	
			Updates:	
			Recommendation:	
			File 2 - Bingham	

DOD: 12/18/12	KEVIN HUDGINS and DANIELL DUTRA were appointed Co-Executors with Full IAEA without bond and Letters issued on 2-7-13.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>As of 02/10/15, nothing further has been filed in this matter.</p> <ol style="list-style-type: none"> 1. Need First & Final Account and Petition for Distribution and/or current verified status report.
Cont. from	On 2-7-13, the Court set status hearing for the filing of the first account or petition for final distribution for 4-11-14.	
Aff.Sub.Wit.		
Verified		
Inventory	On 4-11-14, there were no appearances. Mr. Shepard was ordered to be personally present on 5-23-14.	
PTC		
Not.Cred.		
Notice of Hrg	On 5-23-14, there were no appearances. The matter was continued to 7-15-14 and Mr. Shepard was again ordered to be personally present.	
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.	On 07/15/14, Mr. Shepard appeared and the status hearing was continued to 10/31/14.	
Conf. Screen	Status Report filed 10-20-14 (not verified) states there are multiple outstanding creditor's claims against the estate and the Co-Executors are continuing their attempt to arrange payment so that the estate can be closed and distributed. Mr. Shepard respectfully requests that the Court extend the time for filing the first and final report of administration.	
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting	On 10/31/14, there were no appearances and the matter was continued to 01/29/15.	
Status Rpt		
UCCJEA		
Citation	On 01/29/15, there were no appearances. Minute Order from 01/29/15 states: The Court issues an Order to Show Cause to Jeff Shepard, Kevin Hudgins, and Danielle Dutra for failure to appear and failure to file an account. All parties are ordered to be personally present in court on 02/19/15. Clerk's Certificate of Mailing indicates that a copy of the 01/29/15 Minute Order was mailed to Jeff Shepard on 01/29/15.	
FTB Notice		
		Reviewed by: JF
		Reviewed on: 02/10/15
		Updates:
		Recommendation:
		File 3 - Hudgins

(1) First and Final Report of Administrator on Waiver of Account and Petition for its Settlement; (2) for Allowance of Statutory and Extraordinary Fees to Attorney for Services; and (3) for Order for Final Distribution Pursuant to Probate Code 3600 et seq.

DOD: 3/31/10	JOSEPH WILLIAM MARTIN , Administrator, is petitioner.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 10/20/14. As of 2/10/15 the following issues remain:</p> <ol style="list-style-type: none"> 1. It appears that the Joseph W. Martin Irrevocable Trust established on 1/16/14 is not a valid "special needs" trust. The requirements for creation of a special needs trust are that the beneficiary must be under the age of 65 at the time of the trust's creation. Mr. Martin is 86. (Title 42 United States Code section 1396p(d)(4)(A)). 2. Petition requests the distribution to the Joseph W. Martin Irrevocable Special Needs Trust, dated 1/16/14. The trust attached to the petition is entitled the Joseph W. Martin Irrevocable Trust established on 1/16/14 with no mention of a special needs trust. <p style="text-align: center;">Please see additional page</p>
	Accounting is waived.	
Cont. from 082514 090814, 102014	I & A - \$125,873.74 POH - \$127,424.94	
<input type="checkbox"/> Aff.Sub.Wit.	Administrator - waives	
<input checked="" type="checkbox"/> Verified	Attorney (statutory) - \$4,776.22	
<input checked="" type="checkbox"/> Inventory	Attorney x/o - \$9,100.00 (40.75 hours @ \$100 – 250/hr for services in connection with the civil litigation and creation of the special needs trust)	
<input checked="" type="checkbox"/> PTC	Costs - \$1,304.32 (probate Referee, publication, certified copies)	
<input checked="" type="checkbox"/> Not.Cred.	Petitioner states he established the JOSEPH W. MARTIN IRREVOCABLE SPECIAL NEEDS TRUST , ("SNT") dated 1/16/14, Donald Fischer, trustee. The SNT currently contains proceeds from the settlement of the civil litigation by order of the Honorable Kristi Culver-Kapetan in the matter entitled <i>Joseph W. Martin v. Mary Quin, et. al</i> , case no. 12CECG03130 filed on 4/2/14. Petitioner requests the court take judicial notice of the order.	
<input checked="" type="checkbox"/> Notice of Hrg W/		
<input checked="" type="checkbox"/> Aff.Mail		
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input checked="" type="checkbox"/> Letters 4/2/13		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input checked="" type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input checked="" type="checkbox"/> FTB Notice		
	Please see additional page	
		Reviewed by: KT
		Reviewed on: 2/10/15
		Updates:
		Recommendation:
		File 4A - Martin

Petitioner request the assets of the estate be distributed to Donald E. Fischer, Trustee of the Joseph W. Martin Irrevocable Special Needs Trust dated 1/16/14.

NEEDS/PROBLEMS/COMMENTS (cont.):

3. Extra ordinary fee requests appear to include attorney services that benefited the administrator, Joseph Martin, personally and not the estate. For instance, Mr. McCloskey states he assisted Mr. Martin in a civil case for financial elder abuse against his daughter, Mary J. Quin entitled *Joseph W. Martin v Mary J. Quin*, case no. 12CECG03130. The action sought to recover assets Mr. Martin alleged were fraudulently taken by his daughter, Mary J. Quin. Mr. Martin was represented by Attorney Babette Fischer in the civil matter and not Mr. McCloskey. Mr. McCloskey also states he assisted in the creation of the Special Needs Trust for Mr. Martin. The special needs trust would be solely for the benefit of Mr. Martin and not for the benefit of the estate. In addition, there are questions regarding the validity of the Special Needs Trust. It appears any attorney fees incurred by the civil case or for Mr. Martin personally should be recovered from Mr. Martin personally outside of the estate. California Rules of Court, Rule 7.702(3) requires the declarant to show the benefit of the services to the estate. - **Declaration of Attorney Daniel T. McCloskey filed on 8/15/14 states** he feels the extraordinary fees are justified due to the unusual circumstances presented by the case, including but not limited to; preparation, filing and related actions to create the Special Needs Trust; preparation and filing and prosecution of the Petition to Determine Title; protracted civil litigation regarding the Petition to Determine Title and Petitioner's physical incapacity and mobility issues after his fall requiring travel to and from the convalescent home and hospital; that the misconduct alleged by his daughter occurred in 2010 and that it was his only daughter, a licensed attorney, who aggressively defended against the complaint and petition.

Status Report filed on 10/10/14 states at the hearing on 9/8/14 the court determined that the Joseph W. Martin Irrevocable Special Needs Trust was not a valid special needs trust pursuant to Title 42 USC §1396p(d)(4)(A), as Mr. Martin was over the age of 65 when the trust was created.

Mr. McCloskey states he has been in contact with the Special Needs Trust Division of the California Department of Health Services (DHS) regarding establishment of a special needs trust.

Mr. McCloskey states he was advised that DHS would require a special needs trust for Mr. Martin provided it was administered by a professional fiduciary working for a non-profit organization. Mr. McCloskey's office contacted the Good Shepard Fund in San Jose and Golden State Pooled Trust in Napa, requesting their assistance in preparation and administration of a special needs trust on behalf of Mr. Martin. To date Mr. McCloskey states he has not received any response and will be following up on the selection of an appropriate trustee and special needs trust.

Mr. McCloskey states it is the Administrator's intention, once a non-profit fiduciary has been selected to petition the court for a revocation of the special needs trust entitled the Joseph W. Martin Irrevocable Trust dated, January 16, 2014, and request approval of a special needs trust by a non-profit fiduciary.

The Administrator, Joseph W. Martin, continues to reside in an assisted living facility in Fresno and has physical mobility issues that make it very hard, if not impossible, to attend the hearing. The Administrator requests that he be excused from attending the status hearing.

Order to Show Cause RE; Failure to Appear and Failure to File and Account

DOD: 4-20-13	<p>KEVIN HUDGINS and DANIELLE DUTRA were appointed as Co-Executors with Full IAEA without bond on 8-29-13.</p> <p>Letters issued on 9-4-13.</p> <p>At the hearing on 8-29-13, the Court set a status hearing on 10/31/14 for the filing of the first account or petition for final distribution.</p> <p>Status Report (unverified) filed 10-21-14 states the first and final account is in the process of being prepared for filing. Due to the complexities involved in this estate and the companion estate of the decedent's daughter, Victoria L. Hudgins, together with the obligation of owning and operating Page Funeral Chapel in Selma, the Executors have limited time to deal with matters of the estate. The attorney respectfully requests that the Court extend the time for filing the first and final account.</p> <p>On 10/31/14, there were no appearances and the status hearing was continued to 01/29/15.</p> <p>On 01/29/15, there were no appearances. Minute Order from 01/29/15 states: The Court issues an Order to Show Cause to Jeff Shepard, Kevin Hudgins, and Danielle Dutra for failure to appear and failure to file an account. All parties are ordered to be personally present in court on 02/09/15. Clerk's Certificate of Mailing states that a copy of the 01/29/15 Minute Order was mailed to Jeff Shepard on 01/29/15.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need First & Final Account and Petition for Distribution and/or current verified status report.</p>	
Cont. from			
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
			<p>Reviewed by: JF</p> <p>Reviewed on: 02/10/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 5 - Page</p>

Atty Smith, Jane T.
Atty Helon, Marvin T

(1) First Account Current and Report of Conservator and (2) Petition for Allowance of Compensation to Conservator and Attorney

Age:		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>CONTINUED TO 3-11-15</p> <p>Per request of County Counsel</p>
DOD:		
Cont. from		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by:
		Reviewed on: 2-11-15
		Updates:
		Recommendation:
		File 6 - Jeffrey

Status Hearing Re: Filing of the Inventory and Appraisal

DOD: 05/17/2013	LOUISE BAKER, was appointed Executor with full IAEA authority without bond on 01/27/2014.	NEEDS/PROBLEMS/COMMENTS:
	Letters issued on 01/28/2014.	
Cont. from 060614, 070114, 081915	Minute Order of 01/06/2014 set this status hearing for the filing of the Inventory and Appraisal.	Minute Order of 08/19/2014: Estate appears to be without assets except for allegations of life insurance proceeds. Beneficiary was changed online days before Ms. Ello's death.
Aff.Sub.Wit.		
Verified		1. Need Inventory and Appraisal or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.
Inventory		
PTC		
Not.Cred.	Former Status Report filed 08/11/2014 states Attorney Calhoun failed to transfer over the hearing of 07/01/2014 due to a change in his calendaring. He and the executrix, Louise Baker, have done an extensive search and found that the estate has no property. However, on review of the events leading up to and during the investigation, it was determined that an individual had changed the beneficiary of the decedent's life insurance three days before her death. The case number of the probate has been used in discovery attempts to determine how such action was taken. As can be seen by the decedent's death certificate, Ms. Ello was in the hospital, and had been for over a month prior to her death. Therefore, with the changing of her beneficiary, it does not appear proper.	
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: LV
		Reviewed on: 02/11/2015
		Updates:
		Recommendation:
		File 7 - Ello

(1) First and Final Account and Report of Co-Executors and (2) Petition for Its Settlement, for (3) Confirmation and Approval of Acts of Co-Executors, for (4) Allowance of Compensation to Co-Executors for Ordinary Services, for (5) Allowance of Compensation to Attorneys for Ordinary and Extraordinary Services, and for (6) Final Distribution

DOD: 1/22/2014		PAMELA J. STEVENSON and EMMA RAE HANSEN , Co-Executors, are petitioners.	NEEDS/PROBLEMS/COMMENTS:
		Account period: 1/22/14 – 12/26/14	
Cont. from		Accounting - \$288,701.08	
<input type="checkbox"/>	Aff.Sub.Wit.	Beginning POH - \$251,838.68	
<input checked="" type="checkbox"/>	Verified	Ending POH - \$183,651.38	
<input checked="" type="checkbox"/>	Inventory	Executors - \$8,774.03 (statutory, \$4,387.02 each)	
<input checked="" type="checkbox"/>	PTC		
<input checked="" type="checkbox"/>	Not.Cred.	Attorney - \$8,774.03 (statutory)	
<input checked="" type="checkbox"/>	Notice of Hrg	Attorney X/O - \$2,512.50 (for sale of real property, 11.50 hrs @ \$125-\$250 per hour)	
<input checked="" type="checkbox"/>	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.	Costs - \$173.74 (probate referee)	
	Pers.Serv.		
	Conf. Screen		
<input checked="" type="checkbox"/>	Letters	Closing - \$3,017.10	
	Duties/Supp		
	Objections	Distribution, pursuant to Decedent's Will, is to:	
	Video Receipt	Emma Rae Hansen - \$40,100.00	
	CI Report	DaDeen Creed - \$40,100.00	
<input checked="" type="checkbox"/>	9202	Marta Peterson - \$16,040.00	
<input checked="" type="checkbox"/>	Order	Brent H. Nay - \$16,040.00	
	Aff. Posting	Jill Gourley - \$16,040.00	
	Status Rpt	Deena Nay - \$16,040.00	
	UCCJEA	Ludell Nay - \$16,040.00	
	Citation		
<input checked="" type="checkbox"/>	FTB Notice		
			Reviewed by: KT
			Reviewed on: 2/11/15
			Updates:
			Recommendation:
			File 8 - Nay

Age: 59	<u>NO TEMPORARY REQUESTED</u>	NEEDS/PROBLEMS/COMMENTS:
	DONNA CARREIRO and PAUL CARREIRO , sister and brother-in-law, are Petitioners and request that the PUBLIC GUARDIAN be appointed as Conservator of the Person and Estate without bond.	CONTINUED FROM 01/15/15 Minute Order from 1/15/15 states: Counsel requests to bifurcate the issue of person and estate. Ms. Kruthers requests time to see if a probate conservatorship is appropriate. The Petition is granted as to the estate ONLY. Matter is continued to 02/09/15 as to the person ONLY. Mr. Rindlisbacher will submit a new order.
Conf. from 011515	Estimated Value of the Estate: Personal property - \$2,500.00	Proposed Conservatee has not been advised of her rights.
<input type="checkbox"/> Aff.Sub.Wit.	Petitioners state that the proposed conservatee suffers from mental health issues and is unable to keep her home properly clean and in a liveable state. Petitioners believe that the proposed conservatee's health is good other than her mental health issues. Petitioner state that the proposed conservatee will not seek help for her mental health problems and refuses to take the medication that is prescribed to her due to irrational beliefs. The proposed conservatee lives alone in a home presently owned by her father's trust, she is also the beneficiary of her father's trust as well as an IRA. A family friend currently delivers groceries to the proposed conservatee. Petitioners also state that the proposed conservatee will give away money despite her own needs and that she is eligible for Medi-Cal and social security disability but is not capable of completing the applications and obtaining the necessary doctor's reports due to her mental health issues.	Letters of Conservatorship of the Estate issued on 02/03/15.
<input checked="" type="checkbox"/> Verified		
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail	w/	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input checked="" type="checkbox"/> Pers.Serv.	w/	
<input type="checkbox"/> Conf. Screen	n/a	
<input type="checkbox"/> Letters	x	
<input type="checkbox"/> Duties/Supp	n/a	
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt	n/a	
<input checked="" type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input checked="" type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
	Court Investigator Dina Calvillo filed a report on 01/12/15.	
		Reviewed by: JF
		Reviewed on: 02/10/15
		Updates:
		Recommendation:
		File 9 - Skopec

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Age:		NEEDS/PROBLEMS/COMMENTS:
DOD:		
Cont. from		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		OFF CALENDAR. Calendared in Error. Hearing scheduled for 2/18/15.
		Reviewed by: KT
		Reviewed on: 2/10/15
		Updates:
		Recommendation:
		File 10 - Lopez

11 John Bone (Spousal)

Case No. 14CEPR01156

Atty Amador, Catherine A. (for Starling Bone – Surviving Spouse – Petitioner)

Spousal or Domestic Partner Property Petition (Prob. C. 13650)

DOD: 6-12-06		<p>STARLING BONE, Surviving Spouse, is Petitioner.</p> <p>No other proceedings</p> <p>Will dated 7-7-04 devises entire estate to Petitioner.</p> <p>Petitioner requests Court determination that the decedent's 50% community property interest in real property located at 210 N. H Street in Fresno passes to her pursuant to Decedent's will, and confirmation that Petitioner's 50% community property interest in the real property belongs to her.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> The original will has not been deposited with the Court pursuant to Probate Code §8200. Petitioner does not provide any information regarding her marriage to the decedent and acquisition of the real property in order for the Court to confirm her 50% community property interest in the real property. The Court may require a verified declaration containing this information.
Cont. from 020315			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail <small>w</small>		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		<p>Reviewed by: skc</p> <p>Reviewed on: 2-10-15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 11 - Bone</p>	

		<p>GREGORY PALMQUIST and KAREN NAZAROFF, Successor Trustees, are petitioners.</p> <p style="text-align: center;">See Petition for details.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. The copy of Trust and Amendments to the Trust attached to the petition do not include a schedule "A" listing the property in the Trust. Probate Code §15206 requires a written intent by the settlor to transfer real property to the trust. A general assignment of "all my right, title and interest in all property owned by me" by the settlor of a declaration of trust is not sufficient to transfer real property into the trust.</p>																																																																			
<p>Cont. from</p> <table border="1"> <tr> <td></td> <td>Aff.Sub.Wit.</td> <td></td> </tr> <tr> <td>✓</td> <td>Verified</td> <td></td> </tr> <tr> <td></td> <td>Inventory</td> <td></td> </tr> <tr> <td></td> <td>PTC</td> <td></td> </tr> <tr> <td></td> <td>Not.Cred.</td> <td></td> </tr> <tr> <td>✓</td> <td>Notice of Hrg</td> <td></td> </tr> <tr> <td>✓</td> <td>Aff.Mail</td> <td>W/</td> </tr> <tr> <td></td> <td>Aff.Pub.</td> <td></td> </tr> <tr> <td></td> <td>Sp.Ntc.</td> <td></td> </tr> <tr> <td></td> <td>Pers.Serv.</td> <td></td> </tr> <tr> <td></td> <td>Conf. Screen</td> <td></td> </tr> <tr> <td></td> <td>Letters</td> <td></td> </tr> <tr> <td></td> <td>Duties/Supp</td> <td></td> </tr> <tr> <td></td> <td>Objections</td> <td></td> </tr> <tr> <td></td> <td>Video Receipt</td> <td></td> </tr> <tr> <td></td> <td>CI Report</td> <td></td> </tr> <tr> <td></td> <td>9202</td> <td></td> </tr> <tr> <td>✓</td> <td>Order</td> <td></td> </tr> <tr> <td></td> <td>Aff. Posting</td> <td></td> </tr> <tr> <td></td> <td>Status Rpt</td> <td></td> </tr> <tr> <td></td> <td>UCCJEA</td> <td></td> </tr> <tr> <td></td> <td>Citation</td> <td></td> </tr> <tr> <td></td> <td>FTB Notice</td> <td></td> </tr> </table>					Aff.Sub.Wit.		✓	Verified			Inventory			PTC			Not.Cred.		✓	Notice of Hrg		✓	Aff.Mail	W/		Aff.Pub.			Sp.Ntc.			Pers.Serv.			Conf. Screen			Letters			Duties/Supp			Objections			Video Receipt			CI Report			9202		✓	Order			Aff. Posting			Status Rpt			UCCJEA			Citation		
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	UCCJEA																																																																					
	Citation																																																																					
	FTB Notice																																																																					
		<p>Reviewed by: KT</p> <p>Reviewed on: 2/11/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 12 - Palmquist</p>																																																																				

13 In Re: Strum Family Trust (Trust)

Case No. 15CEPR00010

Atty Dowling, Michael D. (for Donald Strum – Trustee – Petitioner)

Petition for Order Approving Modification of Trust Terms

		See petition for details.	NEEDS/PROBLEMS/ COMMENTS:	
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			W
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 2-11-15	
			Updates:	
			Recommendation:	
			File 13 - Strum	

Petition for Letters of Administration; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DOD: 11/28/2014	CRAIG COSTI , brother is petitioner and requests appointment as Administrator with bond fixed at \$100,000.00.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need Affidavit of Publication. 2. Petitioner is not listed on #8 of the petition as required. <p>Note: Since the Receipt of Bond was filed no Status Hearing was provided for the filing of the Receipt of Bond.</p> <p>Note: If the petition is granted status hearings will be set as follows:</p> <ul style="list-style-type: none"> • Thursday, 06/18/2015 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal and • Thursday, 04/21/2016 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution. <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.</p>
	Receipt of Bond filed in the amount of \$100,000.00 on 01/26/2015	
Cont. from		
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified	Full IAEA - ?	
<input type="checkbox"/> Inventory	Decedent died intestate	
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.	Residence: Kingsburg Publication: Need	
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail	Estimated value of the Estate	
<input type="checkbox"/> Aff.Pub.	Personal property - \$2,000.00 Real property - \$91,000.00 Total - \$93,000.00	
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.	Probate Referee: Rick Smith	
<input type="checkbox"/> Conf. Screen		
<input checked="" type="checkbox"/> Letters		
<input checked="" type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: LV
		Reviewed on: 02/11/2015
		Updates:
		Recommendation:
		File 14 - Costi

Petition for Probate of Will and for Letters of Administration; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DOD: 07/10/2014		<p>SUSAN TURNER, daughter is petitioner and requests appointment as Administrator without bond.</p> <p>Petitioner is a resident of Craig, Colorado.</p> <p>All heirs waive bond.</p> <p>Full IAEA – o.k.</p> <p>Decedent died intestate.</p> <p>Residence: Fresno Publication: The Business Journal</p> <p>Estimated value of the Estate</p> <table> <tr> <td>Personal property</td> <td>-</td> <td>\$12,000.00</td> </tr> <tr> <td>Real property</td> <td>-</td> <td>\$215,000.00</td> </tr> <tr> <td>Less encumbrances</td> <td></td> <td>-\$96,577.00</td> </tr> <tr> <td>Total</td> <td>-</td> <td>\$243,423.00</td> </tr> </table> <p>Probate Referee: Steven Diebert</p>	Personal property	-	\$12,000.00	Real property	-	\$215,000.00	Less encumbrances		-\$96,577.00	Total	-	\$243,423.00	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Proposed personal representative is a resident of Colorado. Probate Code § 8571 states notwithstanding a waiver of bond, the court in its discretion may require a nonresident personal representative to give a bond in an amount determined by the court.</p> <p>Note: If the petition is granted status hearings will be set as follows:</p> <ul style="list-style-type: none"> • Thursday, 03/19/2015 at 9:00am in Dept. 303 for the filing of the Bond. • Thursday, 06/18/2015 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal <u>and</u> • Thursday, 04/21/2016 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution. <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.</p>
Personal property	-		\$12,000.00												
Real property	-		\$215,000.00												
Less encumbrances			-\$96,577.00												
Total	-		\$243,423.00												
Cont. from															
<input type="checkbox"/>	Aff.Sub.Wit.														
<input checked="" type="checkbox"/>	Verified														
<input type="checkbox"/>	Inventory														
<input type="checkbox"/>	PTC														
<input type="checkbox"/>	Not.Cred.														
<input checked="" type="checkbox"/>	Notice of Hrg														
<input checked="" type="checkbox"/>	Aff.Mail	w/													
<input checked="" type="checkbox"/>	Aff.Pub.														
<input type="checkbox"/>	Sp.Ntc.														
<input type="checkbox"/>	Pers.Serv.														
<input type="checkbox"/>	Conf. Screen														
<input checked="" type="checkbox"/>	Letters														
<input checked="" type="checkbox"/>	Duties/Supp														
<input type="checkbox"/>	Objections														
<input type="checkbox"/>	Video Receipt														
<input type="checkbox"/>	CI Report														
<input type="checkbox"/>	9202														
<input checked="" type="checkbox"/>	Order														
<input type="checkbox"/>	Aff. Posting														
<input type="checkbox"/>	Status Rpt														
<input type="checkbox"/>	UCCJEA														
<input type="checkbox"/>	Citation														
<input type="checkbox"/>	FTB Notice														
		<p>Reviewed by: LV</p> <p>Reviewed on: 02/11/2015</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 15 - Melville</p>													

Probate Status Hearing RE: Filing of the First Account or Petition for Final Distribution

DOD: 5/3/2001	PATRICIA CURRY-TAYLOR was appointed Executor with full IAEA and without bond on 7/18/2006.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need first account, petition for final distribution or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.</p>
	Letters issued on 7/18/2006.	
Cont. from	First account or petition for final distribution was due September 2007.	
Aff.Sub.Wit.	Inventory and Appraisal, partial no. 1. Filed on 9/4/14 show a value of \$140,034.22.	
Verified	Inventory and Appraisal, final, filed on 12/4/14 shows a value of \$165,768.59.	
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: KT
		Reviewed on: 2/11/15
		Updates:
		Recommendation:
		File 16 - Hollier

Status Hearing Re: Filing of the Inventory and Appraisal

DOD: 5/8/14	<p>GLEN R. BLUE was appointed Administrator with full IAEA authority and without bond on 10/9/14.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>
	<p>Letters issued on 10/9/14.</p>	<p>1. Need Inventory and Appraisal or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.</p>
Cont. from	<p>Minute order dated 10/9/14 set this status hearing for the filing of the inventory and appraisal.</p>	
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: KT
		Reviewed on: 2/11/15
		Updates:
		Recommendation:
		File 17 - Blue

		See petition for details.	NEEDS/PROBLEMS/COMMENTS: <u>Note:</u> Page 19 is a related case. Minute Order 1-8-15: Esmeralda Mendez is sworn to interpret in the Spanish language. The Notice of Hearing was filed on 12-3-14 and the petition is orally verified in open court. The Court orders Ms. Chavez to pay the filing fees owed and submit an order for the accounting. Cont. to 2-19-15 at 9:00 am in Dept. 303. <u>Note:</u> As of 2-10-15, an order has not been submitted. 1. Need Order.	
Cont from 082114, 100914, 111314, 010815				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input type="checkbox"/>	Aff.Mail			
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input type="checkbox"/>	Letters			
<input type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input type="checkbox"/>	Order			X
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
		Reviewed by: skc		
		Reviewed on: 2-10-15		
		Updates:		
		Recommendation:		
		File 18 – Mendez		

		See petition for details.	NEEDS/PROBLEMS/COMMENTS: Please see related case on page 18. <u>Minute Order 1-8-15:</u> Esmeralda Mendez is sworn to interpret in the Spanish language. The Notice of Hearing was filed on 12-3-14 and the petition is orally verified in open court. The Court orders Ms. Chavez to pay the filing fees owed and submit an order for the accounting. Cont. to 2-19-15 at 9:00 am in Dept. 303. <u>Note:</u> As of 2-10-15, an order has not been submitted. 2. Need Order. <u>Note:</u> The Court will set a status hearing for the filing of the next account as appropriate.	
Cont. from 082114, 100914, 111314, 010815				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
	Aff.Mail			
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
	Order			X
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
		Reviewed by: skc		
		Reviewed on: 2-10-15		
		Updates:		
		Recommendation:		
		File 19 - Chavez		

		See petition for details.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Note:</u> This petition pertains to the minor Paige only. Pedro Luna, Maternal Grandfather, was appointed Guardian of the minor Bailee on 4-2-14.</p> <ol style="list-style-type: none"> 1. Need Notice of Hearing (Form GC-020). 2. Need proof of service of Notice of Hearing pursuant to Probate Code §1460(b)(5) <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence on: <ul style="list-style-type: none"> - Paige Liggett (Minor, 14) - Jon Liggett (Father) - Rosa Luna (Mother) 3. Proof of Service filed 2-6-15 indicates that Pedro Luna, maternal grandfather and guardian of this minor's sibling Bailee, was personally served by the sheriff; however, the Notice of Hearing mandatory form has not been filed. The Court may require clarification. 	
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg			x
	Aff.Mail			x
	Aff.Pub.			
	Sp.Ntc.			
✓	Pers.Serv.			w
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report	x		
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 2-11-15	
			Updates:	
			Recommendation:	
			File 20 - Liggett	

Petition for Visitation

		<p>See petition for details.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Minute Order 1-8-15:</u> Lupe Mendez is sworn to interpret in the Spanish language; Ms. Gonzalez is advised to bring her own interpreter to the next hearing. The Court orders the Court Investigator to check on the welfare of the minors and provide the paperwork regarding this hearing to the guardian. Cont. to 021915 900 303.</p> <p><u>Note:</u> As of 2-10-15, nothing further has been filed.</p> <p>1. Petitioner filed a declaration of due diligence regarding the guardian. The Court may require further diligence for notice of hearing to be served.</p>	
Cont from 010815				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input type="checkbox"/>	Notice of Hrg			X
<input type="checkbox"/>	Aff.Mail			
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input type="checkbox"/>	Letters			
<input type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
		Reviewed by: skc		
		Reviewed on: 2-10-15		
		Updates:		
		Recommendation:		
		File 21 – Silva & Gonzalez		

		TEMPORARY DENIED 09/09/2014	NEEDS/PROBLEMS/COMMENTS:
		<u>Please see petition for details.</u>	Minute Order of 12/18/2014: Examiner notes are provided to the petitioner. Mr. Todd objects to the petition. Mr. Todd is directed to file written objections.
			No written objections have been filed.
Cont. from 102814, 121814			The following issues remain:
<input type="checkbox"/>	Aff.Sub.Wit.		1. Need proof of personal service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for:
<input checked="" type="checkbox"/>	Verified		<ul style="list-style-type: none"> • Devron Todd (Father)
<input type="checkbox"/>	Inventory		Note: Personally served on 12/11/2014 only 7 days prior to the Court hearing and not the required 15 days prior to the hearing.
<input type="checkbox"/>	PTC		<ul style="list-style-type: none"> • Devine Blessing Todd (Minor)
<input type="checkbox"/>	Not.Cred.		2. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for:
<input checked="" type="checkbox"/>	Notice of Hrg		<ul style="list-style-type: none"> • Michael Todd (Paternal Grandfather) • Dorthea Ross (Paternal Grandmother) • Willie Lee Harris (Maternal Grandfather) • Benona Gardner (Maternal Grandmother) • Siblings over 12 years of age
<input type="checkbox"/>	Aff.Mail	X	3. Page #5 of the Guardianship Petition – Child Information Attachment (GC 210(CA)) which pertains to whether the child has Native American Ancestry was not completed. Need declaration with page #5 attached.
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input checked="" type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		Reviewed by: LV
<input type="checkbox"/>	Status Rpt		Reviewed on: 02/11/2015
<input checked="" type="checkbox"/>	UCCJEA		Updates:
<input type="checkbox"/>	Citation		Recommendation:
<input type="checkbox"/>	FTB Notice		File 22 – Todd

23 Mary Chagoya (Def Succ)
Atty Chagoya, John I (Pro Per – Petitioner – Son)
Atty Chagoya, Phillip (Pro Per – Petitioner – Grandson)

Case No. 14CEPR00791

Petition to Determine Succession to Real Property (Prob. C. 13151)

DOD: 06/01/2011	JOHN I. CHAGOYA , son, and PHILLIP CHAGOYA , grandson, are petitioners.	NEEDS/PROBLEMS/COMMENTS:	
	40 days since DOD		
Cont. from 101414, 111314, 010815	No other proceedings		
<input type="checkbox"/> Aff.Sub.Wit.	I&A - \$60,000.00		
<input checked="" type="checkbox"/> Verified	Will dated: 01/29/1999 devises all property, both real and personal, to John I Chagoya and Phillip Chagoya in equal shares.		
<input checked="" type="checkbox"/> Inventory			
<input type="checkbox"/> PTC			
<input type="checkbox"/> Not.Cred.	Petitioners request Court determination that decedent's 100% interest in real property located at 1085 South Hope Reedley, California pass to John I Chagoya and Phillip Chagoya in equal shares pursuant to decedent's will.		
<input checked="" type="checkbox"/> Notice of Hrg			
<input checked="" type="checkbox"/> Aff.Mail	w/		
<input type="checkbox"/> Aff.Pub.			
<input type="checkbox"/> Sp.Ntc.			
<input type="checkbox"/> Pers.Serv.			
<input type="checkbox"/> Conf. Screen			
<input type="checkbox"/> Letters			
<input type="checkbox"/> Duties/Supp			
<input type="checkbox"/> Objections			
<input type="checkbox"/> Video Receipt			
<input type="checkbox"/> CI Report			
<input type="checkbox"/> 9202			
<input checked="" type="checkbox"/> Order			
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			
<input type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input type="checkbox"/> FTB Notice			
			Reviewed by: LV
			Reviewed on: 02/11/2015
		Updates:	
		Recommendation: Submitted	
		File 23 - Chagoya	

24 **Chrissy Scott & Rebecca Scott (GUARD/P)**
 Atty Shambouger, Shawna (Pro Per – Petitioner – Maternal Aunt)
 Atty Shambouger, Eric (Pro Per – Petitioner – Maternal Uncle)
 Atty Scott, Andrew (Pro Per – Petitioner – Maternal Grandfather)

Case No. 14CEPR00993

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

		<u>TEMPORARY EXPIRES 02/19/2015</u>	NEEDS/PROBLEMS/COMMENTS: Minute Order of 01/08/2015: Examiner notes handed in open court; matter continued to allow the defects to be cured. 1. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for: <ul style="list-style-type: none"> • Paternal Grandparents (Unknown) Note: proof of service by mail was served on Gary Keith Burkard and Melvena Lockyer on 01/26/2015 however it is unclear who these individuals are.
		<u>Please see petition for details</u>	
Cont. from 010815			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg	x	
	Aff.Mail	x	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.	n/a	
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
✓	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: LV
			Reviewed on: 02/11/2015
			Updates:
			Recommendation:
			File 24 - Scott

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

		<u>TEMPORARY EXPIRES 2/19/15</u>	<p>KELLIE A. YOUNG, maternal grandmother, is petitioner.</p> <p>Please see petition for details.</p> <p>Court Investigator Report filed on 2/11/15</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need Notice of Hearing. 2. Need proof of personal service of the Notice of Hearing along with a copy of the Petition, or Consent and Waiver of Notice or Declaration of Due Diligence on: <ol style="list-style-type: none"> a. Shyawn Williams (mother) 3. Need proof of service of the Notice of Hearing along with a copy of the Petition, or Consent and Waiver of Notice or Declaration of Due Diligence on: <ol style="list-style-type: none"> a. Paternal grandparents b. Vershon Williams (maternal grandfather)
Cont. from				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input type="checkbox"/>	Notice of Hrg	X		
<input type="checkbox"/>	Aff.Mail	X		
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.	X		
<input checked="" type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input checked="" type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input checked="" type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input checked="" type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
			Reviewed by: KT	
			Reviewed on: 2/11/15	
			Updates:	
			Recommendation:	
			File 25 - Henderson	

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

		See petition for details.	NEEDS/PROBLEMS/COMMENTS: 1. Pursuant to Proof of Service filed 2-11-15, the mother was served with Notice of Hearing, but without a copy of the petition. The Court may require further service. 2. Notice of Hearing filed 2-11-15 includes service on someone named Jack Lilles, but it is unclear from the file who this person is. Is this the maternal grandfather? <u>Note:</u> The minute order of 1-6-15 indicates that someone named Lawrence Buckner was present, but it is unclear from the file who this person is.	
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
	Aff.Mail			
	Aff.Pub.			
	Sp.Ntc.			
✓	Pers.Serv.			W
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			X
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 2-11-15	
			Updates:	
			Recommendation:	
			File 26 - Austin	

		See petition for details.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Court Investigator advised rights on 2-10-15.</p> <p>1. Need proof of personal service of Notice of Hearing with a copy of the temporary petition at least five court days prior to the hearing on the proposed Conservatee Mary Lou Hernandez pursuant to Probate Code §2250(e).</p>	
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			W
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			X
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 2-11-15	
			Updates:	
			Recommendation:	
			File 27 - Hernandez	